

Leadership Competency Development Guide

Competency Cluster: Maximizing Performance Results



Competency: Planning and Organizing

Definition: Defining tasks and milestones to achieve objectives, while ensuring the optimal use of resources to meet those objectives.

Behavioral Indicators:

- Anticipates and prepares
- Considers impact and makes changes
- Logically approaches situations
- Documents project progress

Developing/Practicing this Competency	Learning from Others	Sample Developmental Goals
<ul style="list-style-type: none"> • Write daily, weekly, and monthly goals. • Prepare agendas and action items whenever you conduct meetings. • Create action plans and milestones for all major projects. • Develop ways to measure and track organization goals. • Research on-line planning and organizing tools. • Read a book on planning and organizing (see below). 	<ul style="list-style-type: none"> • Interview someone known for their excellent ability to achieve results. Ask them how they planned, organized, and monitored their project. • Work with your manager to develop goals and action items for your next project. • Volunteer to work on a project with someone who is strong in planning and organizing. 	<ul style="list-style-type: none"> • By January 16, I will outline goals, tasks, and milestones to accomplish the Customer Service Improvement Project. • By March 30, I will develop performance measures for the team's objectives. • By June 15, I will set up a tracking system to monitor progress on the redeployment project. • By November 15, talk to Fred Rodriguez about how he plans and monitors major projects and implement at least one idea on my next project.



Leadership Competency Development Guide for Planning and Organizing

This is not an exclusive list of resources. Please feel free to conduct your own search for more resources related to Planning and Organizing in civil service.

Resources Index



**Definition, Behavioral Indicators,
Developmental Activities**



**Academic Journals and Books
on-line and available for checkout**



**Videos and Podcasts
on-line and available for checkout**



**Courses
on-line and for a fee**



Webinars



Other Resources



Academic Journals and Books **On-Line and Available for Checkout**



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Courses On-Line and for a Fee



Courses for a Fee on Planning and Organizing

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[On-line Courses](#)



Webinars



Coming Soon!!



Resource Links



Department of Personnel Administration (DPA)

[Workforce Planning](#) - provides a toolkit of resources for state agencies.

[Linked Documents](#)



Academic Journals and Articles On-Line

[How to Create and Facilitate Meetings That Matter.](#)

This article offers guide to creating and facilitating successful or productive meetings. Three things are required to create and facilitate effective meetings, including preparation, conducting and documenting the meeting and following up. To change meeting experience, records and information management professionals have the opportunity to create and facilitate meetings that matter, and in the process, ensure that corporate memory is captured. To move organizational agendas, follow-up and follow-through are considered critical.

Author: Francisco, Janice M.

Source: Information Management Journal 41, no. 6 (November 2007): 54-58.

[Do Project Managers' Leadership Competencies Contribute to Project Success?](#)

This article explores the following hypothesis: There is a statistically significant relationship between a project manager's leadership competencies and project success. Two proven questionnaires, the leadership dimensions questionnaire (LDQ) and the project success questionnaire (PSQ), were used to gather data from 52 project managers and project sponsors from a financial services company in the United Kingdom. The results from the LDQ and PSQ are presented in this article. A factor analysis of PSQ revealed three independent factors: usability, project delivery, and value of output to clients. The last factor is not related to project leadership or management, so the article concentrates on correlations between the other two factors and project leadership. Eight separate leadership dimensions were found to be statistically significantly related to performance, so the hypothesis was largely supported. Identifying such relationships provides managers with guidance on possible selection and project improvement models, whereby increased capability in leadership dimensions can lead to increased success in project management. [ABSTRACT FROM AUTHOR]

Authors: Geoghegan, Linda, and Victor Dulewicz

Source: Project Management Journal 39, no. 4 (December 2008): 58-67

[Are we on a learning curve or a treadmill? The benefits of participative group goalsetting become apparent as tasks become increasingly challenging over time.](#)

A large body of research has pointed to the utility of individual and group goal setting as a performance enhancement strategy. However, group goal setting is more complex than individual goal setting as the group context often strengthens the desire for voice and the possibility of resistance. In line with this idea, we test the prediction that goal-related performance improvements should be more marked where groups participate in

goal setting rather than having goals imposed—particularly as they become increasingly hard to achieve. These ideas are tested in two experiments ($N_{\text{groups}} = 27, 72$). Both confirm the capacity for group goal setting to enhance brainstorming performance. More importantly, both studies also show that the benefits of participative goals relative to imposed goals become more marked as goals become more difficult over time. In line with social identity and self-categorization principles, we suggest that this is because increases in participatively set goals appear to provide opportunities for collective self-actualization and self-enhancement while increases in imposed goals do not. Copyright © 2008 John Wiley & Sons, Ltd. [ABSTRACT FROM AUTHOR]

Authors: Haslam, S. Alexander, Jürgen Wegge, and Tom Postmes

Source: European Journal of Social Psychology 39, no. 3 (April 2009): 430-446

[CHAPTER 10: Managing the Project Team.](#)

Chapter 10 of the book "Fundamentals of Project Management" is presented. It discusses how to manage members of a project team. Recruitment and other aspects of organizing a project team; dealing with goals, responsibilities and procedures; leadership styles; and managing interpersonal conflicts among members are discussed.

Author: Lewis, James P.

Source: In Fundamentals of Project Management, 128-139. American Management Association International, 2007

[CHAPTER 3: Planning the Project.](#)

Chapter 3 of the book "Fundamentals of Project Management" is presented. It discusses the principles of planning within the context of project management. Planning involves developing strategy, tactics and logistics to achieve goals. Planning steps are detailed. Factors that cause managers to avoid planning are discussed.

Author: Lewis, James P.

Source: In Fundamentals of Project Management, 128-139. American Management Association International, 2007

[A New Role for Management in Today's Post-Industrial Organization.](#)

The article analyzes the meaning of industrial management in the 21st century in the U.S. It states that modern management can be defined as a way of achieving goals that are a priority and can be done in three ways which can be by luck, in a disorganized manner or in a cost effective manner. It discusses reinvention of the work of managers of modern day as they need to behave like customers, partners and investors. A manager also help employees find motivation and makes best use of resources.

Author: McCrimmon, Mitch

Source: Ivey Business Journal 74, no. 4 (July 2010): 6

[Objectives—Are they useful? A quick assessment.](#)

Most people understand the importance of objectives and the link between having objectives and accomplishing results. However, there is a difference between a well-defined objective and a poorly developed objective both in how they are constructed and in what they ultimately lead to. In this article, we explore three levels of objectives, provide examples of good objectives at each level, and put forth a 7-point inspection any objective should meet if it is to be a useful objective. [ABSTRACT FROM AUTHOR]

Authors: Moore, Stephanie, James B. Ellsworth, and Roger Kaufman

Source: Performance Improvement 47, no. 7 (August 2008): 41-47

[Goal Statements and Goal-Directed Behavior: A Relational Frame Account of Goal Setting in Organizations.](#)

Goal setting has consistently been shown to increase performance under specific conditions. These goal setting effects have previously been explored from both a cognitive perspective and in terms of traditional behavioral concepts. We highlight limitations of these approaches and propose a novel account based on Relational Frame Theory. This account focuses on both the content of goal statements and the contingencies that maintain goal-directed behavior. The content of goal statements is analyzed in terms of relational networks established for employees. We then detail how the current account explains the major effects noted in previous empirical studies. Two broad types of rule following contingencies that support goal-directed behavior, pliance and tracking, are then described. We then outline how these different types of contingencies results in the variety of goal-directed behavior observed in organizations. Throughout we relate this two-part approach to goal setting to specific recommendations for practice and future basic research. [ABSTRACT FROM AUTHOR]

Authors: O'Hora, Denis, and Kristen A. Maglieri

Source: Journal of Organizational Behavior Management 26, no. 1/2 (January 2006): 131-170

[Project Management, Cost Engineering, Project Definition, Action Plans or What?](#)

The article discusses the use of project management, cost engineering, and project definition to meet the client's expectations. Accordingly, project management process (PMP) is a systematic method for evaluating and executing projects which can be attained through the completion of certain activities. An action plan can help keep track of pass gate documentation and key deliverables by providing the sponsor and the project steering team in an opportunity to review and evaluate the project at the end of each phase.

Author: Uppal, Kul B.

Source: AACE International Transactions (June 2008): 1-11

[Project Management Process and Action Plans.](#)

Discusses the steps in developing a project management process and action plan. Identification of obligations, decisions, and issues that needs to be documented; Determination on the part of the team or a team member to implement an action at an agreed time; Revision of the plan.

Author: Uppal, Kul B.

Source: AACE International Transactions (June 2004): 1

[Begin with the End in Mind.](#)

Clarifying and articulating learning goals is indispensable to the success of a mentoring relationship. While some mentees come to a mentoring relationship with well-defined goals, it is more the exception than the rule. Most mentees come with a general idea about what they want to learn. That idea becomes the starting point for a mentor's assistance in the goal-setting process. "Starter goals" are the initial goals a mentee brings into a mentoring relationship. They are usually not fully developed at this point and need work to turn them into SMART mentoring goals. If they are too broad, neither the mentor nor mentee will be satisfied with the learning process, the learning outcome, or the mentoring relationship. If they are not mutually agreed upon, the mentor and mentee may be working at cross purposes to try to achieve them. The bottom line is this: Begin with the end in mind. When mentees lack well-defined goals, goal setting must be the first priority, and the mentor's immediate task is to assist the mentee in clarifying and defining goals. This must be completed before the work of the relationship begins in earnest. The second priority is to keep the momentum going and to use the goals to benchmark progress and stay on track. [ABSTRACT FROM PUBLISHER]

Authors: Zachary, Lois J., and Lory A. Fischler

Source: T+D 65, no. 1 (January 2011): 50



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Planning and Organizing Books Available for Checkout

Book Title	Author	Publisher	Year	Call Number
The ABCs of Evaluation: Timeless Techniques for Program and Project Managers, 2nd ed.	John Boulmetis, Phyllis Dutwin	Jossey-Bass	2005	HD31.B633 2005
Designing and Planning Programs for Nonprofit and Government Organizations, 1st ed.	Edward J. Pawlak, Robert Vinter	Jossey-Bass	2004	HV40. P325 2004
Effective project management	Robert K. Wysocki, Robert Beck, Jr. and David B. Crane	Wiley	2000	HD69.P75W95 2000
The Little Black Book of Project Management	Michael C. Thomsett	AMACOM	2002	HD69.P75T48 2002
New Directions in Project Management	Tinnirello, Paul C.	Auerbach	2002	T56.8.N49 2002
Practical Project Management: Tips, Tactics, and Tools	Harvey A. Levine	J. Wiley	2002	HD69.P75L484 2002
Project Management for Planners: A Practical Guide	Terry A. Clark	American Planning Association	2002	HD69.P75C522 2002
Project Planning, Scheduling, and Control: A Hands-On Guide to Bringing Projects in On Time and On Budget	James P. Lewis	McGraw Hill	2005	HD69.P75L493 2005
Staying Focused on Goals and Priorities	Blair Sheppard	Dearborn Trade Pub	2006	HD57.7.S725 2006
The Wiley Guide to Managing Projects	Peter W.G. Morris, Jeffrey K. Pinto.	John Wiley & Sons	2004	HD69.P75W552 2004



Books Available On-Line

EBooks:

[Business Reengineering](#)

[Entrepreneurship](#)

[Project Management](#)

[Absolute Beginner's Guide to Project Management](#) by Greg Horine. Que, 2009

[The AMA Handbook of Project Management](#) by Paul C Dinsmore; Jeannette Cabanis-Brewin. AMACOM, 2010

[The Change Leader's Roadmap: How to Navigate Your Organization's Transformation](#) by Linda Ackerman Anderson, Dean Anderson, and Daryl R. Conner. Pfeiffer, 2010

[Fast Projects: Project Management When Time is Short](#) by Fergus O'Connell. FT Press, 2009.

[How the Best Leaders Lead: Proven Secrets to Getting the Most Out of Yourself and Others](#) by Brian Tract. AMACOM, 2010.

[Chapter 3: Counterattack! Business Lessons from Military Strategy](#)

[More Than a Minute](#) by Holly G. Green. Career Press, 2008

[More Time for You: A Powerful System to Organize Your Work and Get Things Done](#) by Rosemary Tator and Alesia Latson. AMACOM, 2010

[The Now Habit at Work: Perform Optimally, Maintain Focus, and Ignite Motivation in Yourself and Others](#) by Neil A. Fiore. John Wiley & Sons, 2010

[Chapter 8: Effective Goal Setting](#)

[**Project Management: A Systems Approach to Planning, Scheduling, and Controlling**](#) by Harold Kerzner. John Wiley & Sons, 2009

[**Project Manager Street Smarts: A Real World Guide to PMP® Skills**](#) by Terri Wagner; Linda Kretz Zaval. Sybex, 2009

[Chapter 2 Planning Process](#)

[**Real-World Time Management**](#) by Roy Alexander; Michael S. Dobson. AMACOM, 2008

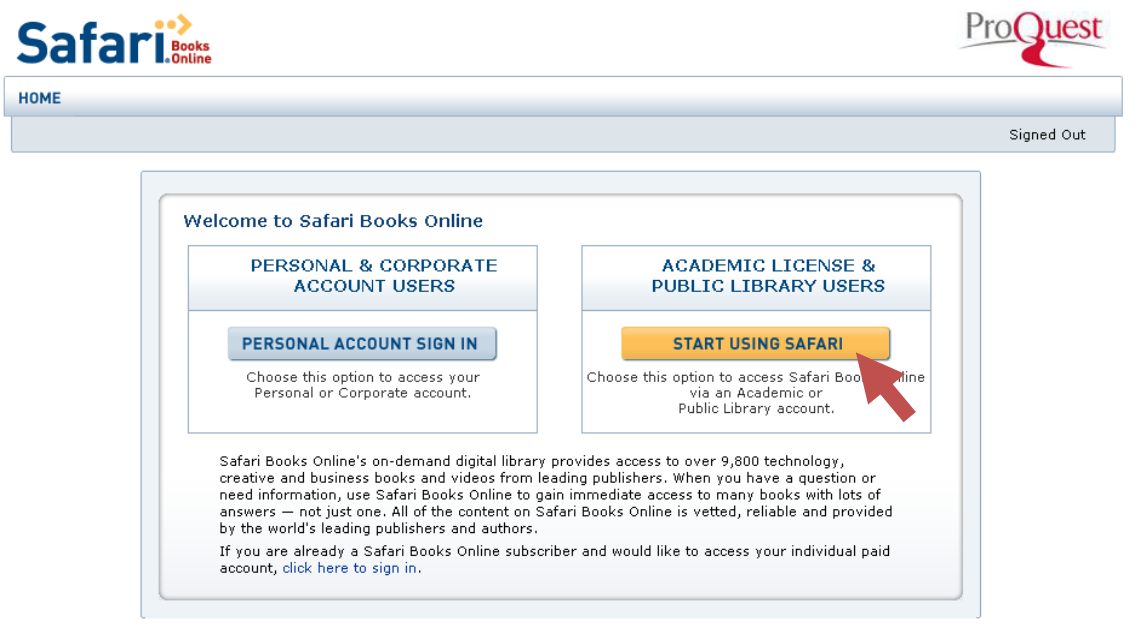
[**Unusually Excellent: The Necessary Nine Skills Required for the Practice of Great Leadership**](#) by John Hamm. Jossey-Bass, 2011

[Chapter 5: Leading Strategy Ideas to Plans](#)



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If you not on a State of California computer,, you will need to enter your State Library card number and PIN in order to log-in to Safari. If you still can't access Safari, please contact the State Library (916-654-0261).The California State Library is open Monday - Friday from 9:30 am - 4 pm.



Video Title	Description	Format/ Length	Year	Call Number
Leading in a Time of Change: A Conversation with Peter F. Drucker & Peter M. Senge	Sit at the table with the visionary leaders setting the agenda for organizational leadership and change! The Drucker Foundation presents you with a conversation between Peter F. Drucker and Peter M. Senge, hosted by Frances Hesselbein. In this dynamic package--which includes a video and companion workbook--these two great minds of modern management share their wisdom on how leaders can prepare themselves and their organizations for the inevitable changes that lie ahead. Watch the video and witness a remarkable discussion between Drucker and Senge as they talk about the importance of all organizations learning to lead change. Using the principles presented in this stimulating video, you can help transform yourself and your organization into a change leader. In addition, the companion workbook will be an invaluable aid in making strategic decisions. It serves as a fundamental resource for planning and implementing changes within your organization. This extraordinary package is an ideal tool for executive retreats, management training, or personal leadership development.	VHS/42 Minutes	2001	HD58.8.L 21 2001
Priorities for Life: Capacity & Energy: Uncommon Reminders for Bringing Out the Best in Yourself and Others	Robert Cooper is an acclaimed educator on how exceptional leaders and teams excel under pressure while everyone else is just competing or falling behind. He provides uncommon yet highly practical guidance on how to bring out more of the best in yourself and others in ways that can make the biggest difference: developing leadership, setting priorities, dealing with change, and increasing personal capacity. This is one of a 6 part program.	DVD/5 Minutes	2001	BF408 P75 2001
Strategic Planning in Government: Not Business as Usual	By dramatically taking you through the same frustrations, discussions and breakthroughs any team drafting a strategic plan is likely to encounter, this film gives you and your team not just the facts, but the confidence needed to draft a plan that complies with Government Performance and Results Act (GPRA).	VHS/22 Minutes	1998	Hd30.28. S7348 1998

Video Title	Description	Format/ Length	Year	Call Number
Take Back Your Time: How To Manage Your Workload And Still Have A Life	Employees can learn how to be more productive and efficient, yet "still have a life" by focusing on what is most important and not "trying to do everything.	VHS/19 Minutes	2004	HD69.T54 T35 2004
Time Management: Getting Control of Your Life and Work	Description This program will help you learn to make each day more productive – and more satisfying – by controlling your time. As a manager, goals help you prioritize and plan, delegating appropriate tasks that also help your employees grow. You'll learn to base the actions you take in the present upon how they will affect the future, so that you can get more of what you want out of life.	DVD/26 Minutes	2004	HD69 T54 T56 2004
Value of Time	In today's ever-changing and hectic workplace, people are constantly wishing that they had 'more time' to get things done. This brief and persuasive meeting opener or closer purely and simply characterizes the inherent value of each increment of time. Regardless of the moment, whether it may appear significant or insignificant, it is our responsibility to make the most of it.	VHS/DV D 2.3 Minutes	2006	HD69 T54 V35 2006

On-Line Courses for a Fee on Planning and Organizing

California Virtual Campus

The California Virtual Campus is an online site to help individuals find long distance learning throughout California. Their course catalog helps individuals find online courses that are available at various California schools.

Phone Number: (530) 879-4085

Online Contact: <http://www.cvc.edu/contact/>

OTech - Training & Event Center, HALO (High Achievement Learning Organization) "Office Desk Courses"

HALO (High Achievement Learning Organization) delivers thousands of online courses and resources to your employees in a connected collaborative environment. With HALO, users can receive training and discuss best practices around specific content. OTech brings you HALO through the LearningPASS program, which offers other training services at deep discounts and no contracts.

Phone Number: (916) 464-7547

Email: training@state.ca.gov

Website: www.training.ca.gov

- Business Etiquette/Managing Time/Managing Multiple Priorities. (1 day)

Instructor-Led Courses for a Fee on Planning and Organizing

State Personnel Board (SPB)

State Personnel Board offers training courses that range from Upward Mobility, to the Analyst Series Certification, Supervisory Training, Equal Opportunity Academy, and more.

Phone Number: (916) 653-2085

Email: ttp@spb.ca.gov

American River College

American River College offers instructor- led and on-line classes that help people prepare for new careers and enhance with current job skills.

Phone Number: (916) 484-8011

Online Contact: info@arc.losrios.edu

College of Continuing Education, California State University Sacramento (CSUS)

The College of Continuing Education at CSUS provides workshops, courses, training programs, and seminars to help adults enhance their careers and improve their job skills.

Phone Number: (916) 278-4433

On-line contact: http://www.cce.csus.edu/general_info/contactus.htm

Centre For Organizational Effectiveness

The Centre For Organizational Effectiveness provides academies and programs on management, organizational development, specialized leadership development, and training programs.

Phone Number: (858) 534-9119

Online Contact: <http://www.tcfoe.com/contact.html>

Email: info@tcfoe.com

Website: <http://www.tcfoe.com/>

- Goal Setting With Staff (4 hours)

Cooperative Personnel Services (CPS)

CPS specializes in training public sector employees and meeting staff needs for each organization. CPS offers certificate programs to help employees advance in their careers.

Phone Number: (916) 263-3614 Option 3

Email: trainingcenter@cps.ca.gov

Folsom Lake College

Folsom Lake College has been developing Career Technology Programs that are designed to help individuals use real world skills and utilize those skills in the workplace.

Website: [Career Technology Programs](#)

Phone Number: (916) 608-6687

Online Contact: http://www.flc.losrios.edu/Contact_Us.htm

- Introduction to Project Management
- Project Integration and Scope Management
- Project Time and Cost Management
- Project Communications and Human Resources Management
- Project Risk Management and Project Procurement Management

Los Rios Community College District, Business and Economic Development Center (BEDC)

BEDC offers training at their worksite in Sacramento and at the employer's worksite. BEDC will customize training to meet the employer's needs.

Phone Number: (916) 563-3230

Email: WinnerB@losrios.edu

Website: www.trainingsource.losrios.edu

- Managing Time and Space (1/2-1 day)

OTech Training Center

The Office of Technology Services (OTech) Training & Event Center provides professional low-cost information systems, business professional development and management training to state, federal, and local government agencies.

Phone Number: (916) 739-7502

Email: Training@state.ca.gov